Pilot 1B Readiness Meeting Agenda

September 25, 2013
10:00 a.m. – 12:00 p.m.

- ✓ **Welcome and Announcements (2 min.) - Karen**

- ✓ **IBHIS New Key Concepts – (10 min.) - Paul**

- ✓ **Practitioner Review and Maintenance (20 min.) – Racheal**

- ✓ **Integration (35 min.) - Ruchi**

  - ✓ **Trading Partner Agreement (TPA) Process**

  - ✓ **Technical Guide – Client Web Services**

  - ✓ **Sample COS File Overview**

- ✓ **ProviderConnect Training - (20 min.) - Giri/Julika**

- ✓ **Reports and Extracts - (15 min.) - Presley**

- ✓ **Readiness Tasks (10 min.)   - Karen**

- ✓ **Readiness Schedule (5 min.)   - Gordon**

- ✓ **Questions**

WELCOME

Karen Bollow

Contract Provider Readiness Meeting
September 25, 2013

WELCOME
Legal Entity Providers
Pilot 1B

Community Family Guidance Center	Counseling & Research Associates
Five Acres	Foothill Family Service
Intercommunity Child Guidance Center	McKinley Children's Center
Pacific Lodge Youth Services	Special Service for Groups
Tessie Cleveland Community Services	The Guidance Center
VIP Community Mental Health	

WELCOME
Network Providers & Billers
Pilot 1B

NETWORK PROVIDERS	BILLERS
Dr. Tsilya Bass	Self
Dr. Haleh Eghrari	Custom Medical Billing
Jill Schmidt, NP	Memorial Counseling

WELCOME
Pilot 1B EHR Vendors

Clinivate

Exym

Welligent

IBHIS KEY CONCEPTS

Paul Arns

Contract Provider Readiness Meeting
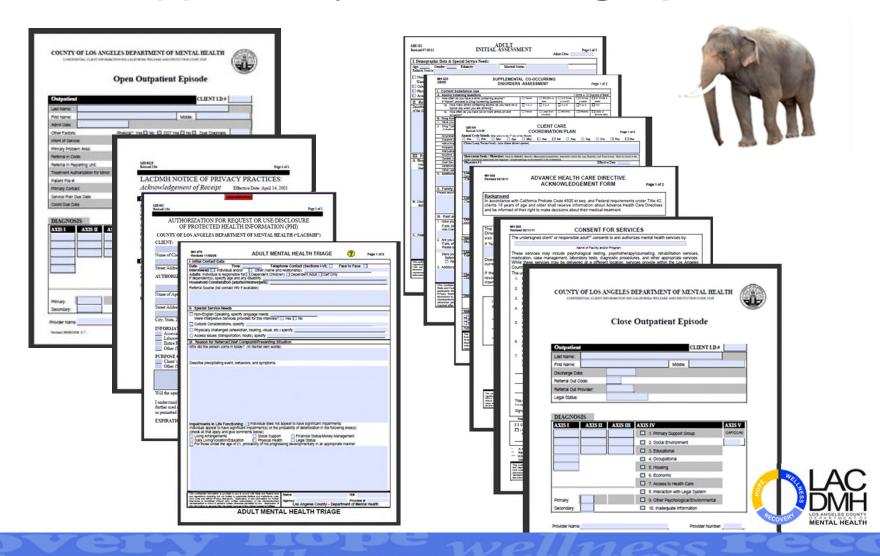**September 25, 2013**

Changes Large & Small

IBHIS Opportunity: **Rethinking Episodes**

IBHIS Opportunity: **Rethinking Episodes** & Eliminating Redundancies

Clinic 1

UCC 3

Wellness Center 5

PMRT 2

FSP Team 4

IS vs. IBHIS Episodes (Outpatient)

- At Reporting Unit / Provider Site

- Close after "inactivity"

- Same client may have multiple episodes within Contracting Provider & over time

- *At Legal Entity / Contracting Provider**

- *Remain Open*

- *Single episode within legal entity over time (despite movement between LE sites)*

* Network Providers 'share' admission episode: FFS2LE Fee For Service 2 Admission (FFS2LE)

Single LE "episode" in IBHIS

Program Of Admission

LE00019 LA County DMH

Vs.

1906A EDMUND D. EDELMAN-OUTPT
7057B DOWNTOWN -OUTPATIENT
7769A EDELMAN WELLNESS CENTER OA FCCS OP
7475A EOB CRIS HMLS EDELMAN OP
7476A EOB CRISIS HMLS AUGUSTUS FH OP

LAC
DMH
LOS ANGELES COUNTY
DEPARTMENT OF
MENTAL HEALTH

Accessing Client History (via Webservice call)

Client: Smith,Joe (000012345)　　　　**Associated Legacy IDs: 333444555; 2223389**

	Program name	Program Type	Admit/ First Service Date	Discharge/ Last Service Date	Practitioner	Primary Dx Description
From History	5007I BHC ALHAMBRA HOSP.-ADULT	Inpatient	7/7/2010	7/12/2010	Director , Medical	296.20-Major Depressive Disorder
From History	7482A M.H. URGENT CARE CTR AT LB	UCC	9/1/2011	9/1/2011	JENKINS, RICK	298.9-Psychotic Disorder NOS
From Avatar	1906A EDMUND D. EDELMAN-OUTPT	Outpatient	2/1/2014	3/24/2014	KRAMER, SANDRA	296.33-Major Depressive Disorder, Severe

Current IS episode history, supplemented by services submitted via DMH or 837's associate to program NPI, allowing construction of service history for clinical reference

LAC DMH
LOS ANGELES COUNTY DEPARTMENT OF MENTAL HEALTH

*Financial Eligibility Setup via Webservice**

- Set up and ordering of Guarantors (e.g., Medi-Cal) required for claims processing

- ** FFS providers may ultimately use portal, with interim support from DMH Provider Support Office (PSO)*

Authorizations
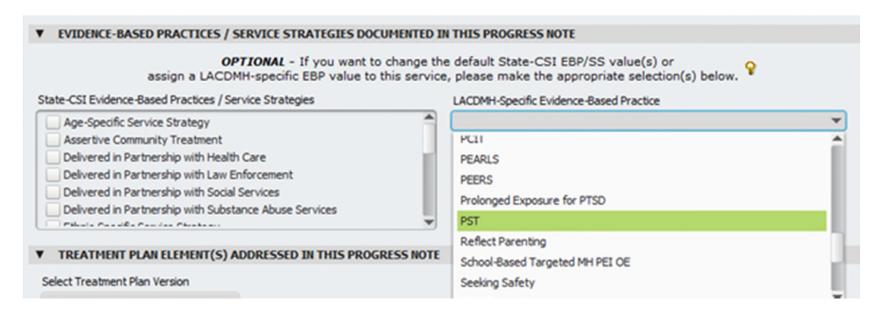
- *NO MORE IS PLANS*

837 contains

- Program-Level Authorizations (P-Auths)
  - Specific to Contracting Provider, Fiscal Year & Funded Program
  - Funded program indicated on Authorization does NOT trump guarantor set-up

- Member Authorizations (M-Auths)
  - Specific to Contracting Provider, Fiscal Year, Funded Program & Client (& limits)
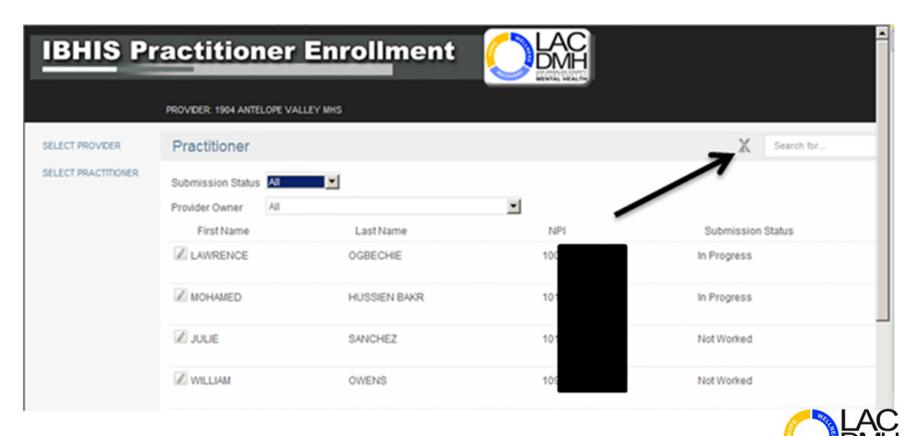 - Requests via Portal (Provider Connect)

EBP's

837 contains single State CSI EBP/SS or LACDMH–specific EBP

IS to IBHIS Data Conversion

IS to IBHIS Data Conversion

- Clients "active" past 10 years
  - De-duplicated: may need "surviving" ID
- OP Episodes & Diagnoses (rolled up to LE)
  - Open and active past 180 days as of Nov. 2013
  - Default Admission date
  - IS Push
- *Importance of post go-live verification*
- Practitioner Updates (snapshot was Feb 2013)
  - DMH Provider Support Office (PSO)

QUESTIONS?

PRACTITIONER MAINTENANCE

Practitioner Registration Maintenance Application

Racheal Burgess and James Spallino

Contract Provider Readiness Meeting
September 25, 2013

Practitioner Maintenance
Practitioner Registration Maintenance Application

How will practitioner maintenance be handled when contract providers go-live on Avatar?

CURRENT SOLUTION AND STATE

- The DMH Practitioner Registration Maintenance Application will be available to contract providers on November 1, 2013.
- The application will allow contract providers to log into the application to:
  - add practitioner data
  - update practitioner data
  - terminate practitioners

Practitioner Maintenance
Practitioner Registration Maintenance Application

How will practitioner maintenance be handled when contract providers go-live on Avatar?

CURRENT SOLUTION AND STATE

- The FFS Practitioner data will also be captured in this application. The workflow is still to be determined.

Practitioner Maintenance
Practitioner Registration Maintenance Application

DMH will provide the following:

- A report showing practitioner data entered into the Integrated System (IS) since 2/4/2013.

- Report will be provided to contract providers prior to their scheduled go-live date.

- Report will be provided to each contract provider one time only.

Practitioner Maintenance
Practitioner Registration Maintenance Application

FUTURE SOLUTION AND STATE

- Contract providers will use a web service to maintain practitioner data.

- FFS providers will use ProviderConnect to maintain practitioner data.

- Estimated time for this solution to be implemented, is still to be determined.

Practitioner Maintenance
Practitioner Registration Maintenance Application

NEXT STEPS

- **The recommendation for Contract Providers is to:**
  - Use the same staff who accessed the "Practitioner Enrollment Application" to update practitioners in the "Practitioner Registration Maintenance Application".

Practitioner Maintenance
Practitioner Registration Maintenance Application

NEXT STEPS

- **RSA token and IS access must be requested if:**
  - Your agency has never used the "Practitioner Enrollment Application", or
  - Staff other than those who maintained the "Practitioner Enrollment Application" will be updating practitioners in the "Practitioner Registration Maintenance Application".

CONTRACT PROVIDERS INTEGRATION

Ruchi Sukhija

Contract Provider Readiness Meeting
September 25, 2013

Overview

- Trading Partner Agreement (TPA) process
- Client Web Services – Technical Guide
- Community Outreach Services (COS) – Key Points
- Testing Phases & Timelines
- Contract Provider Testing - Checklist
- Q/A

TPA PROCESS

– With the "electronic" process, there will be no need for submitting the paper form(s)

– By clicking a link, you will be able to create, save, update and submit your TPA request

– Upload your signed Trading Partner Agreement and view at any time

– Interactive way of downloading digital keys

– View the status of your request real-time

TPA PROCESS

- New links on the IBHIS website
  - Trading Partner Application (TPA) link
  - User Manuals

- Start Date (Pilot 1b) : 09/16/13

CLIENT WEB SERVICES – TECHNICAL GUIDE

- The purpose of this document is to outline the technical design of the Client Web Services of LACDMH, and serve as a basic technical manual to help interpret and use the various Client Web Services operation(s).

CLIENT WEB SERVICES – TECHNICAL GUIDE: KEY FEATURES

- Mapping of Business Functions to Web Services Operations
  - Search Client
  - Create and Admit New Client
  - Admit Existing Client
  - Update Client
  - Discharge Client
  - Get Client Information

CLIENT WEB SERVICES – TECHNICAL GUIDE: KEY FEATURES

- Security: Authorization & Authentication
  - The Client Web Services will be using Digital Certificate to authorize and authenticate the calling party. The SOAP message must contain:
    - Program Identifier (a.k.a. Legal Entity Number or Provider Number)
    - Digital Certificate (assigned by TPA process)

CLIENT WEB SERVICES

- New links on the IBHIS website
    - Technical Design Document
    - Error Codes and Description
    - WSDL Documentation
    - WSDL

COMMUNITY OUTREACH SERVICES(COS) – KEY POINTS

- The Contract Providers will be able to send COS data electronically to LACDMH via a **file-drop** process.

- The filename **must** start with "COS" prefix.

- The file **must** be in pipe-delimited "|" format.

- The file **must** adhere to COS Companion Guide guidelines.

- A **sample file** is provided on IBHIS website.

TESTING PHASES & TIMELINES

- Digital Key Testing
- COS Testing
- Web Services Testing
- EDI Claims Testing

DIGITAL KEY TESTING

- After submitting the TPA request, you will be assigned a Digital Key. The instructions to download the Digital Key is covered in the TPA User Manual.

- Testing Start Date (Pilot 1b): 10/01/13

DIGITAL KEY TESTING

- The process of validating the Digital Key is as follows:
  - Using the Digital Key, connect to "new" IBHIS File-drop location.
  - Drop EDI sample files (with "new" Header) into the "upload" folder
  - If you currently do COS business with LACDMH, drop COS data files (prefixed with "COS") into the "upload" folder

DIGITAL KEY TESTING

- New <u>links</u> on the IBHIS website

  ➢ IBHIS Secure File Exchange location

  ➢ EDI Sample 837P Header Format

  ➢ Community Outreach Services (COS) Sample COS File

COS TESTING

- DMH released the Companion Guide in **August, 2013**.

- COS Contract Providers and their respective EHR vendors will make appropriate changes to their systems.

- **Testing Start Date (Pilot 1b): 11/04/13**

WEB SERVICES TESTING

- DMH has released the Companion Guide in **August, 2013** and Technical Design Document for Web Services in **September, 2013.**

- Contract Providers and their respective EHR vendors will make appropriate changes to their systems.

- **Testing Start Date (Pilot 1b): 11/04/13**

EDI CLAIMS TESTING

- DMH IBHIS EDI Companion Guide will be released in **November, 2013**.

- Contract Providers and their respective EHR vendors will make appropriate changes to their systems.

- **Testing Start Date (Pilot 1b):** **12/2013**

CONTRACT PROVIDER TESTING-CHECKLIST

- To help keep track of various activities and timelines, a checklist has been created for your reference.

- Handout

QUESTIONS

PROVIDERCONNECT

Giri Patterikalam

Contract Provider Readiness Meeting
September 25, 2013

USER TYPES

- Initial roll out will include two user types - Day Treatment providers and FFS providers.

- Day Treatment providers will use ProviderConnect to request authorizations. The current Day Treatment System will no longer be used.

- FFS providers will use ProviderConnect to search for clients, update demographics and request over threshold authorizations. The current OTAR system will no longer be used.

- Note: Custom forms for DMH are in development including:
    - Day Treatment – Care Plan, Service Necessity
    - OTAR - Over Threshold Treatment Authorization (OTAR)

ACCESS

- ProviderConnect is an external interface to the IBHIS system which exposes some functionality to the provider community.

- It has a web interface which can be accessed thru the internet.

- In order to access the web portal, the provider will be registered to the system .

- DMH will issue login credentials, once the provider is registered into IBHIS and requires access to provider connect.

LOG IN SCREEN

MAIN SCREEN

ProviderConnect - Main Menu	9/23/2013 2:19:44 PM	Log
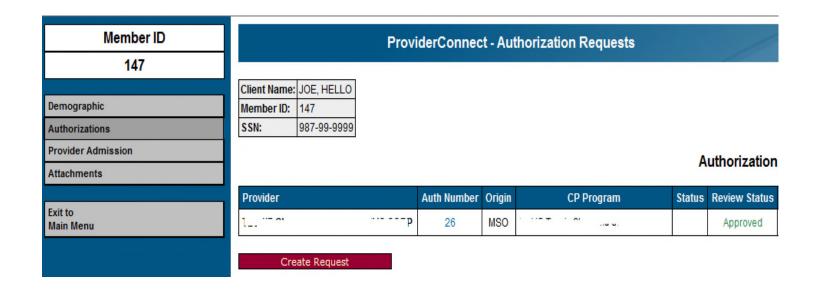
You are logged in as:	
Your last login was:	9/23/2013 2:20:00 PM

Main Menu - Provider		
Lookup Client	Add New Client/Client Search	Change Password
Documentation	News	

Logout / Exit

REQUEST AUTHORIZATION

AUTHORIZATION DETAILS

9/23/2013 2:31:4

Authorization Request

Client Information

CLIENT NAME	MEMBER ID	PROVIDER NAME
HELLO JOE	147	

Care Manager

CARE MANAGER ASSIGNED:	DATE ASSIGNED:

Authorization Information

AUTHORIZATION NUMBER:	CURRENT AUTHORIZATION STATUS:	CURRENT AUTHORIZATION STATUS REASON:
AUTHORIZED LEVEL OF CARE:	TYPE OF AUTHORIZATION:	PERFORMING PROVIDER TYPE:
PLANNED ADMIT DATE:	INITIAL OR CONTINUING AUTH:	NEXT REVIEW DATE:

Diagnosis

Primary Diagnosis	
Secondary Diagnosis	

Funding Source & Benefit Plan Information

Funding Source:	Benefit Plan:	Provider Registration Date For Funding Source:
- Please Choose One - *	- Please Choose One - *	
Program:		
- Please Choose One - *		

Authorization Group
Leave blank for individual CPT Codes requests.

AUTHORIZATION RESPONSE

Authorization Request
Approved

Client Information

CLIENT NAME	MEMBER ID	PROVIDER NAME
HELLO JOE	147	

Care Manager

CARE MANAGER ASSIGNED:		DATE ASSIGNED:
p517445		9/9/2013

Authorization Information

AUTHORIZATION NUMBER:	CURRENT AUTHORIZATION STATUS:	CURRENT AUTHORIZATION STATUS REASON:
26	A - Approved	APPRFULL - Authorization Request Fully Approved
AUTHORIZED LEVEL OF CARE:	TYPE OF AUTHORIZATION: 8 - Managed Care	PERFORMING PROVIDER TYPE:
PLANNED ADMIT DATE: 9/11/2013	INITIAL OR CONTINUING AUTH: 1 - Initial	NEXT REVIEW DATE:

Diagnosis

Primary Diagnosis	312.33 *PYROMANIA*
Secondary Diagnosis	

Funding Source & Benefit Plan Information

Funding Source: DMH Outpatient Services (CGF) MC	Benefit Plan: DMH MHSvces (MC / HF) DAYTX	Provider Registration Date For Funding Source:
Program:		

Authorization Group

PROCEDURE CODE	DESCRIPTION	UNITS REQUESTED	UNITS AUTHORIZED
H2012:HE:TG	Day Treatment Intensive,Full Day	90	90

Authorization Dates

Requested: -
Authorized: 9/11/2013 - 12/10/2013

PROVIDERCONNECT TRAINING

Julika Barrett

Contract Provider Readiness Meeting
September 25, 2013

OVERVIEW

- What to expect for training
- Who will be trained, i.e., learner types
- What will be covered in training
- How will training be delivered
- Where and when will training occur

TRAINING GOAL

To provide you with the knowledge and skills to perform job functions using ProviderConnect.

TRAINING OBJECTIVE

To bridge the gaps between your
current job functions and the way you
will perform job functions in the IBHIS
environment.

WHO WILL BE TRAINED?

User Types = Learner Types*

- Day Treatment Providers (Legal Entities)
- Fee For Service Providers

*Trained according to job functions

WHAT WILL BE COVERED?

Day Treatment Providers (Legal Entities)

- Review what are the same processes.
- Complete forms (created to be similar to existing forms).
- Review and use new applications replacing current ones.
- Review gaps between old and new job functions – not large.
- Practice new ways to capture information.
- Practice how to request service authorization.

WHAT WILL BE COVERED? continued

Day Treatment Providers (Legal Entities) training agenda includes how to:

- Client search
- Create and edit service authorizations

WHAT WILL BE COVERED? continued

Fee For Service Providers

- Review and practice entering information – new to job functions.
- Review differences between current and new tasks.
  - New data required, e.g., CSI data, episodes
  - New terminology
  - Continue to capture demographics
  - Client search

WHAT WILL BE COVERED? continued

Fee For Service Providers training agenda includes:

- Client search
- View and edit client demographic information
- Create and edit service authorizations

HOW WILL TRAINING BE DELIVERED?

Two modes of delivery:

- Instructor-led training (Legal Entities)

- Web-Ex training (Fee for Service)

Duration:

- 1 hour of instruction

- Post training practice

NEXT STEPS

When will training occur?

- During the readiness process, i.e.:

    – After provisioning

    – Before testing

How will I know?

- Prior notification regarding training.

QUESTIONS?

REPORTS AND EXTRACTS

Presley Becerra

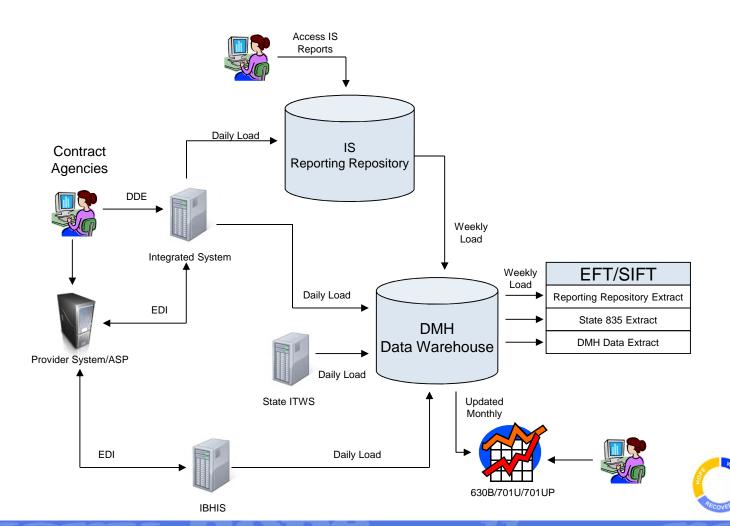### Contract Provider Readiness Meeting
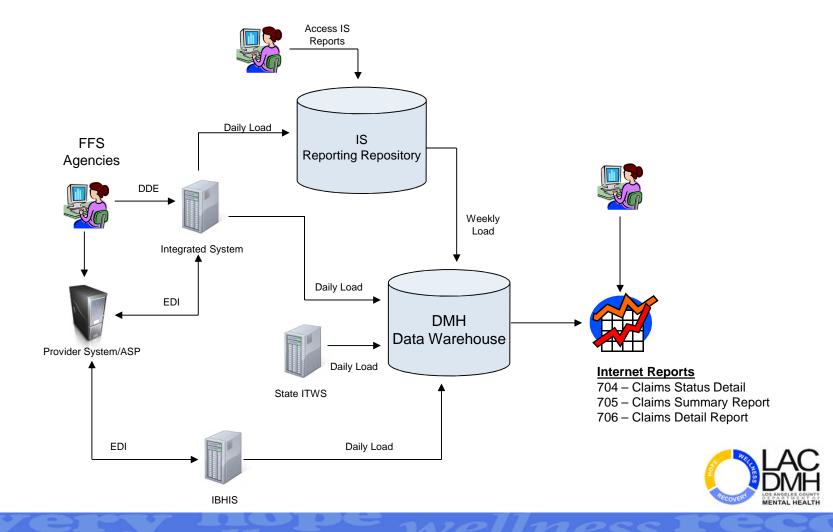### September 25, 2013

REPORTS and EXTRACTS

- Overview of data/reports used by Contractors/Network Providers in EDI Production
  - SIFT/EFT
  - FinClaimList
  - 630B/701U/701UP Reports
  - 704/705/706 Reports (Network Providers)

REPORTS and EXTRACTS – Legal Entities

REPORTS and EXTRACTS – Network Providers

Access IS Reports

FFS Agencies

IS Reporting Repository

Daily Load

DDE

Integrated System

EDI

Provider System/ASP

Daily Load

State ITWS

Daily Load

Weekly Load

DMH Data Warehouse

Daily Load

EDI

IBHIS

Daily Load

Internet Reports
704 – Claims Status Detail
705 – Claims Summary Report
706 – Claims Detail Report

CONTRACTOR READINESS

Karen Bollow

Contract Provider Readiness Meeting
September 25, 2013

OUTLINE

- Overview
- Readiness Areas
- Readiness Tasks
- Next Steps

WHAT DOES READINESS MEAN

- All business functions, technical processes, training, policies and procedures are completed and in place
- Contractor has successfully completed their "Readiness Tasks"

KEY READINESS AREAS

1. Practitioner setup in IBHIS
2. Trading Partner Agreement
3. Testing – Web Services, Community Outreach Services file transfer, and Claims

KEY READINESS AREAS

4. ProviderConnect (Provider Portal)
5. Reporting and SIFT Extracts

READINESS TASKS

- Handout

NEXT STEPS

- Identify your Readiness Team
- Review the Readiness Tasks
- Develop a readiness project schedule
- Notify your vendor of the testing timeline
- Begin readiness tasks

NEXT STEPS

- Monitor project schedule
- Contact CPTT if you have questions at:
  - CPTT@dmh.lacounty.gov
- Review the IBHIS EDI Website(s) regularly for updates
- Legal Entities
  - http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_homepage.htm
- FFS Providers
  - http://lacdmh.lacounty.gov/hipaa/ffs_IBHIS_EDI_homepage.htm

QUESTIONS

IBHIS PILOT 1B READINESS SCHEDULE

Gordon Bunch

Contractor Readiness Meeting
September 25, 2013

IBHIS ROLLOUTS:
LEGAL ENTITY (LE) CONTRACT PROVIDERS

- IBHIS Pilot 1-A   January 27, 2014
  - Directly Operated Sites and Programs only

- Pilot 1-B   February 20, 2014
  - Eleven Legal Entity volunteers
  - Three FFS2 Network Providers

IBHIS ROLLOUTS:
LEGAL ENTITY (LE) CONTRACT PROVIDERS

- Legal Entity IBHIS Go-Live   July 1,2014
  - Remaining 115 Legal Entities

- Fee-For-Service (FFS) Contract Providers IBHIS Go-Live   Sept. 3,2014
  - 274 FFS Providers

READINESS GROUP 1

- Pilot 1(b) participants   (11 LE + 3 FFS)
- Provisioning Start: September 3, 2013
- Provisioning End: October 31, 2013
- Testing Start: November 4, 2013
- Testing End: February 14, 2014
- Go-Live :   February 20, 2014

READINESS GROUP 1

Community Family Guidance Center

Masada Homes

Five Acres

Foothill Family Service

Intercommunity Child Guidance Center

McKinley Children's Center

Pacific Lodge Youth Services

Special Service for Groups

Tessie Cleveland Community Services

The Guidance Center

VIP Community Mental Health Center

Haleh Eghrari, Ph.D.

Jill Schmidt, Nurse Practitioner

Tsilya Bass, M.D.

READINESS GROUPS

Readiness Group 2: (Moved to Group 3)

Readiness Group 3: 2/5/14 thru 5/14/14

    41 Legal Entities

Readiness Group 4: 3/4/14 thru 5/30/14

    38 Legal Entities

Readiness Group 5: 4/3/14 thru 6/30/14

    36 Legal Entities

READINESS GROUPS

Readiness Group 6:   4/1/14 thru 6/2/14

    29 FFS Providers

Readiness Group 7:   5/1/14 thru 7/1/14

    71 FFS Providers

Readiness Group 8:   6/2/14 thru 8/1/14

    75 FFS Providers

Readiness Group 9:   7/1/14 thru 9/2/14

    96 FFS Providers

THE GOOD THE BAD AND THE UGLY

QUESTIONS?